CONTRACT AMENDMENT NO. 2 CONTRACT FOR OCLC Montana Group Services CONTRACT NO: LIB21-0019LS

This CONTRACT AMENDMENT No. 2 amends the above-referenced contract between the State of Montana, Montana State Library (State), whose address and phone number are P.O. Box 201800, Helena, MT 59620-1800, 406-444-3115 and Online Computer Library Center, OCLC, Inc. (Contractor), whose address and phone number are 6565 Kilgour Place, Dublin, OH 43017-3395 and 614-764-6000 or 800-848-5878.

This Contract is amended as follows:

- 1) Under the section entitled Effective Date, Duration, and Renewal, the parties mutually agree to extend this Contract from July 1, 2022 through June 30, 2025 per the terms, conditions, and prices agreed upon. This is the second renewal, third through fifth years of the Contract.
- 2) Section 5.1 Payment Schedule is replaced with the following:
- <u>5.1 Payment Schedule.</u> In consideration of the OCLC Montana Group Services to be provided, State shall pay Contractor according to the following schedule:
 - \$449,900.00 for State fiscal year 2023, July 1, 2022, through June 30, 2023, as outlined in the attached quote dated June 20, 2022.
 - \$469,020.75 for State fiscal year 2024, July 1, 2023, through June 30, 2024, as outlined in the attached quote dated June 20, 2022.
 - \$488,954.13 for State fiscal year 2025, July 1, 2024, through June 30, 2025, as outlined in the attached quote dated June 20, 2022.
- 3) Section 18. Contract Termination is amended by the addition of the following new paragraph 18.5:
 - 18.5 Termination For Convenience. State may, by written notice to Contractor, terminate this Contract without cause and without incurring liability to Contractor, except as provided in this paragraph. State shall give notice of termination to Contractor at least 60 days before the effective date of termination. State shall pay Contractor that amount, or prorated portion thereof, owed to Contractor up to the date State's termination takes effect, plus an additional amount equal to seventy-five thousand dollars (\$75,000) multiplied by the number of full years remaining in the Term as of the effective date of the termination. This is Contractor's sole remedy. State shall not be liable to Contractor for any other payments or damages arising from termination under this paragraph.

Except as modified above, all other terms and conditions of Contract No. LIB21-0019LS remain unchanged.

STATE OF MONTANA MONTANA STATE LIBRARY PO BOX 201800 HELENA, MT 59620-1800

BY: Jennie Stapp State Librarian (Name/Title) DocuSigned by: unin Stepp CFCAC4928784DB (Signature) DATE: 7/27/2022 Legal Approval: DocuSigned by: 7/26/2022 Legal Counsel (Date) Approved as to Form: DocuSigned by: anna Lubick 7/27/2022 Procurement Officer (Date) State Procurement Bureau

OCLC, Inc. 6565 Kilgour Place Dublin, OH 43017-3395 FEDERAL ID # 31-0734115

BY: Bruce Crocco Vice President

(Name/Title)

Docusigned by:

(Signature)

DATE: 7/27/2022

Chief Information Officer Approval (ITPR_8462_2022524162427):

Contractor is notified that, under the provisions of 2-17-514, MCA, the Department of Administration retains the right to cancel or modify any contract, project, or activity that is not in compliance with the Agency's Plan for Information Technology, the State Strategic Plan for Information Technology, or any statewide IT policy or standard.

Chief Information Officer
Department of Administration

Docusigned by:

7/27/2022

7/27/2022

Department of Administration



OCLC Group Services Pricing State of Montana (MZB)

Cara Orban Montana State Library 1515 E 6th Ave Helena MT 59601

June 20, 2022

	FY23	FY24	FY25
OCLC Cataloging and Metadata Subscription	\$260,245.87	\$271,306.32	\$282,836.84
OCLC WorldShare ILL Subscription	\$123,071.80	\$128,302.35	\$133,755.20
OCLC FirstSearch/WorldCat Discovery	\$50,843.79	\$53,004.65	\$55,257.35
Total for Cataloging, WorldShare ILL and FirstSearch	\$434,161.46	\$452,613.32	\$471,849.39
ILLiad - Montana State University Bozeman (MZF)	\$8,745.10	\$9,116.77	\$9,504.23
ILLiad - University of Montana Mansfield Library (MTG)	\$6,993.44	\$7,290.66	\$7,600.51
Total ILLiad	\$15,738.54	\$16,407.43	\$17,104.74
TOTAL GROUP SERVICES	\$449,900.00	\$469,020.75	\$488,954.13

NOTES:

Pricing is valid through June 30, 2022.

The FY23 renewal subscription period is July 1, 2022 - June 30, 2023 for all Services. The annual subscription amounts will be billed on July 1, 2022.

For a three-year agreement, an annual increase of 4.25% is included for fiscal years 2024 and 2025. This pricing is only valid if Montana State Library commits to the full three-year subscription period, pursuant to Section 5.1 of the Master Services Agreement.

Individual subscription prices will be allocated by the Montana State Library and invoiced annually by OCLC. The Montana State Library will provide OCLC with these allocations prior to each fiscal year renewal period.

Montana State Library can add or remove libraries during the fiscal year. The allocated subscription amount invoiced to a library joining during the fiscal year will be credited to Montana State Library (symbol MZB). The allocated subscription amount credited to a library removed during the fiscal year will be invoiced to Montana State Library (symbol MZB).

The allocated subscription amount for libraries removed from the group due to nonpayment will be invoiced to Montana State Library (symbol MZB).

Prices quoted are exclusive of any applicable local, regional, state or other taxes.

WorldShare ILL and ILL Referral Center participation is noted in Attachment A.

OCLC Tax ID Number or FEIN: 31-0734115

DocuSigned by:	
Junia Strap	7/27/2022
Signature Signature	Date



OCLC Group Services Pricing State of Montana (MZB) Subscription Period: July 1, 2022 - June 30, 2023

Attachment A

	Attachment A				
Symbol	State of Montana - Servi	Library Type	ill.	ILL Referral Center	
ABSKE	Library Absarokee Elementary School Library	School	ILL	X	
ABSKE	Absarokee High School Library	School		X	
ALBPS	Alberton School Library	School		Х	
ASHLD	Ashland Public School	School		Х	
AT0	Crowley Fleck Library	Special	Х		
B6Z BCCHS	Bonner Public School	School School		X	
BCCHS	Billings Central Catholic High School Library St Francis Primary School Library	School		X	
BES	Bench Elementary School	School		X	
BFHJL	Bigfork High School Library	School		Х	
BFQ	Bigfork K-8 Library	School		X	
BGK	Big Sky Elementary School	School		X	
BGSND BIE	Big Sandy Public Schools Billings Career Education Center	School School		X	
BJP	Bridger Public Library	Public		X	
BLQ	Jefferson County Library	Public	Х		
BQN	Burlington Elementary School	School		Х	
BQQ	Boulder Elementary School	School		X	
BRIPS	Bridger Public Schools	School		X	
BTK BTP	Beartooth Elementary School	School Public		X	
BWH	Belt Community Library Broadwater Elementary (Billings)	School		X	
BWQ	Billings West High School	School		X	
BYL	Billings Senior High School	School		X	
BYT	Bitterroot Elementary School	School		Х	
C@Y	Clancy Elementary School	School		Х	
CLNCY	North JeffCo Library District	Public	Х		
DBZ DJR	Darby Community Library West Yellowstone Schools Library	Public School		X	
DJK	Montana Department of Transportation	Special	Х	^	
DZP	Dutton/Teton Public	Public	X		
E@H	Central Heights Elementary School	School		Х	
E5A	Eagle Cliffs Elementary School	School		Х	
E5K	McKinley Elementary School	School		X	
E6K	Alkali Creek Elementary School	School		Х	
E7R	Arrowhead Elementary School	School School		X	
E8A E8K	Miles Avenue Elementary School Meadowlark Elementary School	School		X	
E8Z	Sandstone Elementary School	School		X	
E9N	Newman Elementary School	School		X	
E9Z	Washington Elementary School Library	School		Х	
EM2	MSU Billings	Academic	X		
EW1	Rocky Mountain College	Votech/Community Col	X		
F@T	Fairfield Public Library	Public	X		
FKK G@L	Three Forks Community Library Glacier County Library	Public Public	X		
G8A	Lewis & Clark Library	Public	X		
GRRPS	Grass Range Public Schools	School		Х	
H#Q	Highland Elementary School	School		Х	
H8Q	Harlowton Public Library	Public		Х	
HAVRM	Havre Middle School	School		X	
HGTSD HGTSD	Heligate Elementary School K-2	School School		X	
HGTSD	Hellgate Intermediate School 3-5 Hellgate Middle School 6-8	School		X	
HKY	Skyview High School Library	School		X	
HW@	Whitehall K-12 Library	School		X	
I8G	St. Ignatius School-Community Library	Public	X		
J9L	Joliet Public Library	Public	Х	ļ	
J9Y	Will James Middle School Library	School		X	
L3Z L3Z	Big Sky High School Chief Charlo Elementary School	School School		X	
L3Z	Jeannette Rankin Elementary School	School		x	
L3Z	Franklin Elementary School	School		X	
L3Z	Hawthorne Elementary School	School		X	
L3Z	Hellgate High School	School		Х	
L3Z	Lewis and Clark Elementary School	School		X	
L3Z	Lowell School Library	School		X	
L3Z L3Z	Meadow Hill Middle School Missoula County Public Schools	School School		X X	
L3Z	Paxson Elementary School	School		X	
L3Z	Porter Middle School	School		X	
L3Z	Rattlesnake Elementary School	School		Х	
L3Z	Russell Elementary School	School		Х	
L3Z	Seeley-Swan High School	School		X	
L3Z	Sentinel High School	School		X	
L3Z	Washington Middle School Library Carnegie Public Library	School	~	X	
L6T L8L	Laurel Public Library	Public Public	Х	Х	
LCEVB	Lewis & Clark Library	Public	Х		
LEQ	Lewis and Clark Middle School Library	School		Х	
LQN	Lewis & Clark Library	Public	X		
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OCLC Group Services Pricing State of Montana (MZB) Subscription Period: July 1, 2022 - June 30, 2023

Attachment A

State of Montana - Service Participation List Library	Attachment A					
LPG		State of Montana - Servi	ce Participation List			
Livingston-Pank County Public Library		Library	Library Type	ILL	ILL Referral Center	
MSCRIM Medicine Crow Middle School					X	
MISSIDE Missouda International School School X MISCES Mortana Bible College Academic X MISCES Mortana Bible College Academic X MISSIDE Mortana Bible College Academic X MISSIDE Carroll College Academic X MICPS Carroll College Academic X MIDRO Carroll College Academic X MIDRO Corrolly Aslpomos Community Library Public X MIDRO Market				Х		
MSCES Mortama State Genealogoal Society Library Special X MTBSM Ben Stacel Midda School School X MTBSM Ben Stacel Midda School School X MTCP Carolic College Agademic X MTDPA Control Microscopy Agademic X MTDPA Outry Elementary School Library Public X MTDPA Darby Selmentary School Library Public X MTDPA Darby Selmentary School Library School X MTELS Moret Ellis Agademy School X MTGL North Standard Academic X MTGL Markarded Academic X MTGL North Standard Academic X MTGL North Standard Academic X MTGL North Standard <td></td> <td></td> <td></td> <td></td> <td></td>						
MTBCSM Morrison Bible College						
MTESM Ben Steele Middle School School X MTCC Chester-Joghin-Inverses Public School School X MTCPS Chester-Joghin-Inverses Public School School X MTDRA Darly Representation of Community Library Public X MTDRA Darly Wash of St. Etrary School X MTDRA Darly Wash of St. Etrary School X MTERS More Table St. Anderson School X MTES More Table St. Anderson School X MTISO LM Mansfeld Academic X MTISO LM Mansfeld Academic X MTLSD Lima School Claric X X MTLSD Lima School Claric X X MTLSD Lima School Claric X X MTLCR Lima School Clari					X	
MTCPS Chester Jopin-Invenees Public School				^		
MTCPS Author Au				Υ	^	
MTDAR				^	Y	
MTDAR						
MTDBA						
MTDEN Denton Community Library Public X MTELS Mort Elia Rademy School X MTGIL MM Mansfield Academic X MTGIL MS Bar School Library School X MTILM MMCBillings Schools School X MTLK MMCBillings Schools School X MTLK Lockwood Intermediate Library School X MTLK Lockwood Intermediate Library School X MTMLD Markattan School-Commanty Library Public X MTMLD Markattan School-Commanty Library Public X MTMMPS Markattan Elementary School K-8 School X MTMTP Mortage Public Commission Library Special X MTMTP Mortage Public Commission Library Special X MTMTP Mortage Public Commanty Library Special X MTSPA Mortage Public Commanty Comman						
MTELS Mount Ellis Academy School X MTG UN North Star School Libray School X MTGL North Star School Libray School X MTL Morth Manage School School X MTL Morth Manage School School X MTLSD Lima School District #12 School X MTLSD Lima School District #12 School X MTMCM Marhattan School Community Library Public X MTMRM Morth School School Library Public X MTMTMR Morth School School Library School X MTMTNL Minage Public School Library School X MTRUC River Public School Library School X MTRO River Public School Library School X MTSDA State Law Library Special X MTSDA State Law Library Special X MTSDA State Law Library School X MTSDA State Law Lib						
MTGIL Not Marsfield						
MTMIL	MTG		Academic	Х		
MITLOK Montana Historical Society Special X MITLOK Lowood Intermediate Library School X MITLOK Lima School District #12 School X MITLOK Lima School District #12 School X MITLOK MITLOK	MTGIL	North Star School Library	School		X	
MTLSC Lims School X X MTLSC MTLS	MTIMC	IMC/Billings Schools	School		X	
MTLSD	MTL	Montana Historical Society	Special		X	
MTMPS		Lockwood Intermediate Library				
MTMRE					Х	
MTMTP				X		
MTMPU						
MTNUL Montana City School X X MTPOW Power Public Schools X X MTRIC Richey Public Schools School X X MTRIC Richey Public Schools School X X MTS State Law Library Special X X MTS State Law Library School X X MTSM Simms High School Library Public X X MTMCL MIsterian X MTMCL MTMCD MTMCD						
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	Y62				X	
	Y64	North Valley Public Library District	Public	X		



OCLC Group Services Pricing State of Montana (MZB) Subscription Period: July 1, 2022 - June 30, 2023

Attachment A

Attachment A State of Montana - Service Participation List				
Symbol	State of Montana - Service Library	Library Type	t ILL	ILL Referral Center
Y65	Mineral County Library	Public	X	ILL TOISHUI GOILLEI
Y66	Thompson Falls Public Library	Public	Х	
Y67	Thompson Falls High School	School		X
Y72	Flathead Valley Community College	Votech/Community Col	X	
Y73 Y76	Kalispell Regional Medical Center Lincoln County High School	Special School	Х	X
Y78	Libby Elementary School	School		X
Y82	Libby Middle/High School Library	School	Х	
Y83	Lincoln County Libraries	Public	Х	
Y89	Troy K-12	School		Х
YFV	Stillwater County Library	Public	X	
YFW YFX	Little Big Horn College Gardiner Public Schools	Votech/Community Col School	Х	X
YFY	Big Horn County Public Library	Public	Х	_ ^
YFZ	Chief Dull Knife College	Academic	X	
YGV	Park High School Library	School	Х	
YGZ	Red Lodge Carnegie Library	Public	Х	
YHW	Roundup Central Elementary School	School		Х
YHX YHY	Roundup School-Community Library Petroleum County Library	Public Public	X	
YIX	Billings Public School Libraries (SD#2)	School	^	Х
YLQ	Yellowstone Christian College	Academic		X
YLX	Billings Clinic Medical Library	Special	Х	
YLZ	Roosevelt County Library	Public	Χ	
YMR	McCone County Library	Public	Х	
YMW YMZ	Glasgow County-City Library	Public Public	X	
YNQ	Sheridan County Library Fort Peck Tribal Library	Votech/Community Col	X	
YNS	Daniels County Library	Public	X	+
YNW	Sidney-Richland County	Public	X	1
YNW	Sidney-Richland County Library Bookmobile	Public	Х	
YNX	Miles Community College	Votech/Community Col		X
YNZ	Miles City Public Library	Public	X	
YOT	Baker Middle / High School Library	School	X	
YOT	Lincoln School Longfellow Library	School School	X	
YOV	Fallon County Library	Public	X	+
YOY	Henry A Malley Library	Public	X	
YPK	Bicentennial Library of Colstrip	Public	Х	
YPN	Ekalaka Public Library	Public		Х
YPQ	Rosebud-County Library	Public	Х	
YPS	Dawson Community College	Votech/Community Col		X
YQP YQQ	Glendive Public Library	Public Public	X X	
YQS	Garfield County Library Prairie County Library	Public	X	+
YQT	Wibaux Public Library	Public	X	
YQV	Great Falls Public Library	Public	Х	
YQY	MSU Great Falls	Academic	X	
YQZ	Blackfeet Community College Medicine Spring Library	Votech/Community Col		Х
YRV	Browning High School Library	School		X
YRX YUV	Wedsworth Memorial Library Choteau/Teton Public Library	Public Public	X	
YUX	Conrad Public Library	Public	X	+
YVQ	Chouteau Public Library	Public	X	
YVT	Lewistown Public Library	Public	Х	
YVU	Toole County Library	Public	Χ	
YVV	Judith Basin County Free Library	Public	X	
YVW	Valier Public Library	Public School	Х	
YVY	Havre High School Havre-Hill County Library	School Public	Х	X
YWN	Highland Park Early Primary Schools	School	^	Х
YWQ	Lincoln-McKinley Primary School	School		X
YWR	MSU Northern	Academic	Х	
YWT	Sunnyside Intermediate School Library	School		X
YWW	Stone Child College	Academic		Х
YWX	Liberty County Library	Public	X	
YWZ YXP	Blaine County Library Aaniiih Nakoda College	Public Votech/Community Col	Х	Х
YXQ	Harlem Public Library	Public Public	Х	^
YXS	Phillips County Library	Public	X	1
YXV	UM Helena	Votech/Community Col	Х	
YYK	Broadwater School-Community Library	Public	Χ	
YYL	Meagher County Library	Public	Х	
YZQ	White Sulphur Springs High School Library	School		X
YZR	Hearst Free Library	Public	X	
YZS YZU	Belgrade Community Library William K. Kohrs Memorial Library	Public Public	X	+
120	Dillon Public Library	Public	X	+
YZV				
YZV YZY	Madison Valley Public Library	Public	X	
		Public Special	Х	X